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ABSTRACT

The passage of a bond issue in support of school building construction or renovation can be one of the most difficult activities for a rural school district. The process of getting a bond passed requires a delicate mix of public relations, community education, and consensus building. In this chapter, a superintendent in a rural district describes his experience working to pass a bond issue to build a new elementary school. The story provides several lessons about passing school bond issues. First, credible leadership from within the school system is important. The superintendent must be viewed as serving the overall good of the school, and the school board and school staff must actively support the bond's passage. Second, community outreach and communication are critical parts of the political process. A well-orchestrated public relations campaign can be helpful, and the importance of sharing information with senior citizens cannot be overstated. It is also important to include members of all segments of the community in project planning and keep the local newspapers informed. Finally, the hard work of volunteers is invaluable in achieving success. (SV)

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CHAPTER 5

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Gaining Rural Community Support for a Bond Issue: A Superintendent's Experience

STEPHEN DEAN BOHRER

All public decisions involving taxpayers' dollars are political in nature. The passage of a bond issue in support of school building construction or renovation can often be one of the most difficult activities for a rural school district. A community may resist increasing their tax burden, may not support the current school board or administration, or may have misconceptions about how the money will be spent. The process of getting a bond passed requires a delicate mix of public relations, community education, and consensus building.

This chapter describes my experience as a superintendent in a rural district working to pass a bond issue to build a new elementary school. While this story describes only one community's experience with the process of gaining community support for a bond issue, I hope the lessons we learned will be useful for other rural communities working to build consensus and public support for new facilities construction.

The story began for me with a speech by W. Edwards Deming, who motivated me to study his "Fourteen Points" and to adapt them to the schools I serve.[1] His first point, "Create consistency of purpose toward

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improvement of product and service," helped guide me in my work as the educational leader of our rural school district, which includes 430 students in a south-central Kansas area encompassing 308 square miles. William W. Scherkenbach expanded upon this first point by identifying top management as having responsibility for establishing the constancy of purpose to meet customer needs, set core values, make policy, and keep the organization on course.[2] These ideas guided me in my work to build community trust in and support of our local schools. This trust and the hard work of volunteers resulted in voter approval of a $4.2 million bond election to replace our 1921 elementary school.

Accepting the Assignment and Assembling a Team

"Do you have any experience in bond elections and construction of new facilities?" I was asked in the spring of 1994, during my interview for the superintendency. This question signaled district needs and the direction the board of education would have me pursue. I soon learned that on three previous occasions in the 1990s district voters failed to approve a new elementary school. The mandate was clear and my work was cut out for me.

My employment began in July of 1994. One of my main responsibilities was to begin working to gain support for building a new elementary school. My first task was to select an outside consultant who could provide objective expertise for a study of district facility needs. As research suggests, the need for a comprehensive facility study is essential.[3] I learned from talking with superintendent colleagues that G. Kent Stewart, professor of education at Kansas State University, was the person who could provide credible advice with a down-home style that our citizens would accept. We quickly signed him up for the task.

Once we had a consultant to assist with leading a study of district facility needs, the next step was to assemble a school facilities study committee. To be most effective, the committee needed representation from a broad range of citizens, including members of the four small towns included in the school district and members of different segments of the population.[4] In February 1995, with the board of education's endorsement, we wrote to the mayors of all the towns in the district, inviting each to appoint a representative to the facilities

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committee. In addition, the board appointed two of its own members to serve, and the elementary and secondary principals each appointed two staff persons to serve. I invited two citizens who attended every board of education meeting (usually to offer criticism), and,as word of the new committee spread, at least three others called and asked to be on the committee. This group of 21 persons, selected to represent each community and segment of the population, was established to create conditions of trustworthiness: the board's trust in the people on the committee to direct the process, and the community's trust in the committee to represent them.

The perception of the board of education and long-time staff was that the regional daily newspaper had not been supportive of previous projects. Wrangling among citizens in the district seemed to be more interesting to the paper than the need for a new building. This time around, we invited the press to take part in the project, making them partners in the process. When invited to join the committee, David Seaton, publisher of the *Winfield Daily Courier*, declined, stating that his paper's responsibility was simply reporting and that he feared that participation on the committee would reduce the paper's objectivity. On the other hand, Davis "Buss" Merritt, the former editor of the *Wichita Eagle*, believed that instead of serving as impartial observers who have no stake in a topic's outcome, journalists should serve more as umpires or referees and become "fair-minded participants" in the public affairs they write about.[5]

In the three years leading up to the successful December 1997 election, the *Courier* published numerous stories about the project. These items were positive and accurate, and the headlines were nonsensational. Most were derived from my weekly "Friday Letter" to the board of education. Knowing that there were numerous other readers of these weekly reports, I often used a writing style that was editorial in nature rather than simply informative, in hopes that the secondary audience was influenced as well as informed.

The school facilities study committee met for the first time on Saturday, April 22, 1996. Lunch was furnished for the all-day meeting, and all the participants seemed to enjoy an interesting and positive day. Notes from the meeting show that the committee perused Dr. Stewart's 35-page facilities report furnished to the members prior to the meeting. The committee identified and discussed 10 problems

with the previous failed bond proposals, discussed the possibility of remodeling the current building (eight miles north of Burden where the secondary building is located), and agreed on several items to prepare for the next meeting. Of the 10 reasons the committee members identified as causing previous bond issue failures, the only one that I could influence was the issue of trust. Committee members said they had not trusted the information presented in the previous elections nor my predecessor's integrity.

Prior to the next meeting, an architect examined the existing building and prepared a preliminary remodeling plan that included an addition with a new kitchen, a dining area, and early childhood classrooms. The plan included a time frame to build an addition, vacate space, remodel one section, and then remodel another. The plan came with a price of $2.5 million, which was also the amount estimated for the construction of a new building across the street. The board of education and school facilities study committee saw the limitations to remodeling and began to discuss the construction of a new facility more seriously. There were two more meetings where ideas were discussed.

At some point, the committee proposed surveying registered voters and the board of education endorsed this plan. Studies have shown that district surveys are an excellent way to determine the type and level of local support.[6] The survey was mailed in January 1996 and the results were discussed at the committee's final meeting on May 9. The survey showed that 42 percent of the population supported a new building in Burden, six percent supported a new building in Cambridge (four miles east of Burden), 19 percent supported a new or remodeled building in Atlanta (eight miles north), while 33 percent wanted to do nothing at the time.

At the May 1996 meeting, the committee realized that the option of a new building in either Burden or Cambridge had the combined support of 48 percent of the voters who responded. Assuming that the Cambridge voters would prefer a new building in Burden over Atlanta, and considering a total of 1,250 registered voters, this presumed level of support left a majority vote for a new elementary school in Burden approximately 26 votes short of passage. Any other combination of voter preference would be much harder to get ratified. The school facilities study committee made a recommendation to the

board of education to build a new building in Burden. The board endorsed the recommendation the same month, calling for a bond election by the end of 1997. This gave us 18 months to design a building and build support prior to an election.

I spent the next six months researching several architects, leading up to a planned selection in November 1996. At an annual planning session in early November 1996, the board asked me to postpone the selection because of the poor agricultural economic conditions in the district. Through the summer and fall, cattle prices had fallen and the wheat crop had been disastrous. We waited six months for the next board of education election and improved agricultural prices. By August 1997, the board was ready to proceed. To speed up the process, the board asked me to select an architect and bond finance advisor.

Because of my previous research on architects, it was easy to recommend Ken Helmer of Howard & Helmer Architects in Wichita and financial advisor Steve Shogren of Ranson & Associates. Shogren pointed out that we had to move fast to have a special election in 1997. Helmer had been involved in one of the previous failed elections, so he had preliminary drawings available for the desired building. At a September meeting, the board approved a resolution calling for a bond election to build an elementary school and requested permission from the Kansas State Board of Education to hold the election and exceed the bond indebtedness limit of 15 percent of district valuation.

Working with the county clerk and a law firm experienced in preparing school bonds, we began preparing the election forms and bond finance documents. The financial advisor discussed the pros and cons of a mail-in ballot with the board and said that with a 10-day time frame to mail them back in, it was hard to focus a campaign to peak at the right time. The board chose, therefore, to hold a conventional election with voting to take place in each of the four towns.

By the October meeting the board had firmer budget and financing plans. The board reduced the budget by $50,000 to $4.2 million, which allowed the expected mill levy to remain at 19 mills for 23 years. The board thought an upper limit of 20 mills would be more important to the voters than the actual cost of the project. The board had examined a plan that included a large competition gym, but the

cost was $1.1 million higher, so they chose to have a smaller gym seating only 300. This was sufficient for practice and nonvarsity contests, as well as elementary physical education, but did not include a stage or performance platform. The board by this time had examined four versions of the building and made suggestions, as had the elementary school staff. The board chose a floor plan and exterior design to promote in the election.

Invitations to an election planning committee meeting were mailed to supporters on the school facilities study committee, as well as to others the board of education suggested based on previous bond issues. These supporters were also invited to the board meeting where the design was chosen. Unfortunately, few attended. Central Elementary School principal Joe DeWeese and I concluded that those on the committee or involved in previous elections were too tired to devote their energy to the issue yet again. He identified three couples with children in the elementary school he thought would be interested and we called them. All three enthusiastically agreed to serve and formed the nucleus of what our financial advisor named the KIDS (Keep Improving District Schools) committee. These highly committed individuals met in early October 1997, along with a few other volunteers and two board members (only two to avoid violation of the Kansas open meetings law). Less than eight weeks remained to design a campaign, produce printed materials, and promote a large voter turnout.[7]

At the first meeting of the KIDS committee, our financial advisor presented a set of materials that gave factual information about the district's current mill levies (general fund, capital outlay, recreation commission, etc.). He also provided information on the history of levies in our district, the expected impact of the new bond on the price of various homes in the district, and the expected impact on each parcel of 160 acres of pasture or worked land. He asked the committee members to write out reasons why the new building was needed and to name the subcommittee on which they wanted to serve—voter registration, ways and means, information central, or community relations.

The voter registration subcommittee targeted unregistered citizens, sent letters to Central High School graduates in college and to 18-year-old high school seniors, and coordinated phone calls prior to the

election. The ways and means subcommittee raised money to pay for any functions that were forbidden expenses of the board of education and controlled the expenditure of the funds in a coordinated budget and record keeping process. The information central subcommittee coordinated the production of brochures, information sheets, newspaper articles, letters to the editor, and advertisements. The community relations subcommittee handled public meetings, civic group presentations, and door-to-door visits. Individuals volunteered to serve on the subcommittee within which they felt most comfortable. The whole KIDS committee consisted of only about ten persons, so each subcommittee had overlapping and multiple responsibilities. The volunteers were few enough in number that they could also serve as the steering committee, making the big decisions about which projects to take on and assigning tasks to the subcommittees.

The steering committee met weekly leading up to the election, held December 2, 1997. One parent, Darren Wesbrooks, took on the duties of overall chairman and performed magnificently. He was on the phone constantly, checking with committee members to assess progress on their assigned tasks. Updated fact sheets were distributed a couple of different times to committee members, to ensure that the most accurate information possible was presented. A decision was reached early in the process not to have large scale public meetings, but to concentrate on smaller gatherings. This prevented a few individuals from monopolizing each of the sessions, as they would not necessarily know about and attend each meeting.

Sessions were offered at each of the four town's monthly senior citizen luncheons. The Burden senior citizens appreciated the presentation and made comments like, "It's about time" and "Hurry up and get it built. I don't have much time left to help pay for it." The Atlanta senior citizens were gracious, but obviously not generally supportive. A presentation scheduled at the Cambridge Senior Citizen Center luncheon was canceled a few days prior to the event, due to "a prior commitment to a singing group." The Grenola senior citizens first said "yes," but called back to cancel, saying "We are not allowed to participate in partisan politics." At each presentation a volunteer described the conditions of the current building, and the principal reiterated the advantages and enhanced features of a new building. The board president talked about the district's work on school

improvement and how the board was committed to student performance, as well as protection of district resources (including taxes). Then the superintendent showed wall chart-sized posters of the district's tax history and the mill levy effects of the proposed new building.

A week before the election, one public meeting was held in Cambridge, a community that had been supportive in the previous elections and considered neutral territory in this one. This meeting allowed anyone who had not already heard the information to do so and eliminated any chance for citizens to say they had not had an opportunity to become informed. Apparently, most voters had made up their minds by then, as attendance included only the election committee, four individuals in opposition, and about three other persons. The meeting format was the same as in previous presentations and was over in about an hour with no "bloodshed."

To help improve voter participation, the voter registration subcommittee purchased voter registration lists from the election commissioners of the three counties with property in the district. These names were placed into a computer database and compared with parent roster lists furnished by the secretaries of the two schools. Personal calls were placed to all parents who were registered, even though their position on the issue was not known. As with all of the election committees, members were restricted by state law from taking a position favoring the election. Thus, calls were informational only. It was assumed that most parents would be supportive.

By checking the lists, subcommittee members also identified persons who were perceived to favor the bond election but were not registered. They, too, were called and encouraged to register. Registration was made easier by having a sign-up table at a football game and articles in the area's weekly newspaper telling everyone how to register. High school seniors who had turned 18 prior to the election were called to the school office, where they were registered without being encouraged how to vote. Through the high school's senior tracking service, letters were sent out to college-age, former students, updating them on current high school activities (homecoming queens, football game reports, etc.) and providing information about the approaching bond election. They were encouraged to vote and told how to request an advance ballot without being told how to vote.

All of these efforts were to help assure a large voter turnout. Large voter turnouts can often help assure passage of bond issues.[8] Our financial advisor had advised us that in general, a third of all citizens would usually vote "no," and a third would usually vote "yes," so we needed to direct our efforts to inform and convince the undecided third. Others have said much the same in suggesting that bond promoters ignore "no" voters and work to create "yes" voters.[9]

One of the most entertaining and effective promotional events was staged by the district board of education president. He prepared two floats for the city of Burden's Sunflower Festival in early October. One had his daughter dressed in pioneer clothes using a washboard in a tub. The second featured him dressed in long underwear, an old straw hat, and cowboy boots. He was sitting in an outhouse loaded on his flatbed truck. He rode along opening the privy door throwing out corn cobs. Both floats had large signs that read, "This works, but we can do better. Think about it." The floats were significant because this man may be the most successful farmer/rancher in the district and will pay more taxes for the new building than nearly anyone else. As a Christian elder who is politically conservative and known for his sense of humor, his willingness to be so visible in the election process was all the more powerful. He also worked hard with the voter registration efforts.

The information central subcommittee edited several versions of a mail-out brochure prior to printing, and created a one-page fact sheet that listed the reasons for the new building, as well as its costs and payment plan. One evening the fact sheets (along with a sketch of the floor plan) were hand carried by committee members and other volunteers to every house in Burden. If home, the residents were given a chance to ask questions and talk and were encouraged to vote, again without being told how to vote. The 14" x 25" three-color brochure was mailed one week prior to the election to every post office box and residence in the district. It again gave a drawing of the building, a floor plan, reasons for need, and an explanation of financing. It was paid for with district monies, as it did not take a position but was an information piece only. Members of this subcommittee also wrote a couple of letters to the editors of the papers and were prepared to write more had anyone submitted letters in opposition.

The Friday before the election, the *Winfield Daily Courier* urged voters to approve the bond issue. In an editorial, the *Courier* characterized a positive vote as being right for the kids, district, and town of Atlanta. The editorial ran in the same edition as a feature article that described the new building, provided evidence for its need, and included quotes by those in opposition and support. The article was featured on the front page and included a large drawing of the floor plan. The paper's positive coverage was gratifying after three years of hard work and it caused the election campaign to peak at just the right time.

One member of the ways and means subcommittee solicited every business in Burden for money to promote the election. Most told her that they would not take a favorable stand for fear of retribution by their citizens. She also turned to individuals and families for support and was able to raise about $900. This was allocated for "Vote YES" advertisements in the two local weekly papers in the district, as well as two ads in the *Courier* newspaper. These appeared two weeks and one week ahead of the election and were offset by ads by the opposition, which also mailed one-page information sheets. The subcommittee was amused by the main tag line used by the opposition: "Show you care . . . vote no." The district's privately-funded mailing featured a more uplifting line; "The right thing to do. . . the right time to do it!"

Four days before the election a "Vote YES" first-class postcard was mailed by the community relations subcommittee to every household with registered voters. The costs of printing and postage were picked up by the ways and means subcommittee. The post card said:

> VOTE YES ON TUESDAY
> You have an opportunity December 2nd to vote for a new
> Central Elementary School.
> The kids deserve it, and the timing is right.
> Our Children . . . Future . . . Responsibility!
>
> Paid for by the KIDS Committee with donated funds
> (Betsy Whitehill, Treasurer)

The Sunday evening before the Tuesday election, volunteers made over 200 phone calls to newly registered voters and others who were thought to favor the election.

On December 2, 1997, voters passed the first bond election in the district since 1971. The issue passed by 40 votes (52 percent "yes" to 48 percent "no") out of a total of 846 votes cast (65 percent of those registered). There were many factors that contributed to this election outcome. The hard work of the committee personnel, favorable agricultural conditions, citizens' improved trust in the board of education's leadership, and the quality of instruction in the district all contributed to a positive outcome.

The district's success was aided by the creation of a long-range plan that convinced citizens the need was legitimate.[10] The plan also provided a financial description that was understandable and adequate for the desired construction, yet did not deny the ongoing needs for instruction. In addition, citizens participated in determining the need and promoting the election.[11]

Lessons Learned

While the story told here is specific to one rural community, we learned several lessons about passing school bond issues that could be useful to all communities. First, credible, trusted leadership from within the school system is important. The superintendent must be sure that his or her actions are not viewed as self serving, but rather as serving the overall good of the school. The board of education must fully support a bond proposal. The school staff must also see the necessity of a bond issue and actively support its passage. Second, community outreach and communication are critical parts of the political process. A well-orchestrated public relations campaign can be helpful here. This involves speaking to the public, including talking to local civic clubs, the media, ministerial alliances, local "politicos," and senior citizens. The importance of sharing information with senior citizens cannot be overstated. Senior citizens are very likely to vote and do not always have clear information about ballot initiatives. It is also important to include community members in the planning stages of the projects and to make sure that the planning committee includes members from all segments of the affected communities. In addition, it is useful to involve local newspapers in the planning process, if possible. They have the ability to write up information and distribute it to a wider audience. All of these activities will ensure that communication between the planning committee and

the broader community is effective in building and maintaining community trust. Local citizens must feel that their input is valued.

A final lesson learned is the importance of volunteer labor. Our success would have been very difficult to achieve without the hard work of a group of volunteers. These committed individuals made an invaluable contribution to the effort.

Conclusion

The hard work during the short campaign period was a strain on all involved, but it was rewarding, too. The voters perceived the campaign to be honest and convincing. A mandate would have been great, but given the difficulty of coalescing four small towns that were still upset over consolidation 30 years ago, a 4.5 percent margin seemed huge. Partly because the bond election was successful, those involved concluded it was a fun and worthwhile undertaking. Some predict that within six months of the new school's opening, no one will admit that they voted against such a beautiful, effective building. I hope that prediction comes true.

Notes

1. Deming, *Out of the Crisis*. Also see Bradley, *Total Quality Management for Schools*, and Crawford, Bodine, and Hoglund, *The School for Quality Learning*.
2. Scherkenbach, *Deming Route to Quality and Productivity*.
3. Conyers and Francl, "We Turned to Madison Avenue"; Fielder, "Bond for the Record Books"; Holt, "Critical Factors That Affect the Passage of School Bond Elections"; Surratt, "Passing a Bond Issue"; and Taylor, "Bond Elections."
4. Holt, "Critical Factors That Affect the Passage of School Bond Elections," and Taylor, "Bond Elections."
5. Merritt, *Public Journalism and Public Life*.
6. Conyers and Francl, "We Turned to Madison Avenue," and Surratt, "Passing a Bond Issue."
7. Studies have shown the importance to success of a cadre of highly committed individuals. See Holt, "Critical Factors That Affect the Passage of School Bond Elections," and Surratt, "Passing A Bond Issue."

8. Conyers and Francl,"We Turned to Madison Avenue"; Henry, "Help for Passing Bond Referenda"; and Holt, "Critical Factors That Affect the Passage of School Bond Elections."
9. Carter, "How to Blow a Bond Issue;" Conyers and Francl, "We Turned to Madison Avenue"; and Henry, "Help for Passing Bond Referenda."
10. See Taylor, "Bond Elections," about the importance of long-range plans.
11. Holt, "Critical Factors That Effect the Passage of School Bond Elections," and Taylor, "Bond Elections."

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